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Report Highlights:

In 2024, Honduras imported \$3.4 billion in agricultural and related products. The United States supplied \$1.3 billion of that total, giving it a 40 percent market share and ranking Honduras as the 23rd-largest market for U.S. agricultural exports worldwide. Consumer-oriented food imports reached \$2.0 billion, or 3.7 million tons, showing nearly 10 percent growth in both value and volume. U.S. exports in this category totaled more than \$612 million in 2024, an 11 percent increase compared to the previous year.

Executive Summary

Honduras is a lower-middle-income country with a Gross Domestic Product (GDP) of \$36.97 billion. The United States is Honduras' largest trading partner in the agricultural sector. In 2024, U.S. consumer-oriented food exports to Honduras increased by \$58 million (10.6 percent) in value and 26.7 tons (11.1 percent) in volume compared to 2023.

Consumer-Oriented Agricultural Imports

Honduras' consumer-oriented imports from the global market exceeded \$2.0 billion in 2024. Imports from the United States accounted for over \$612 million.

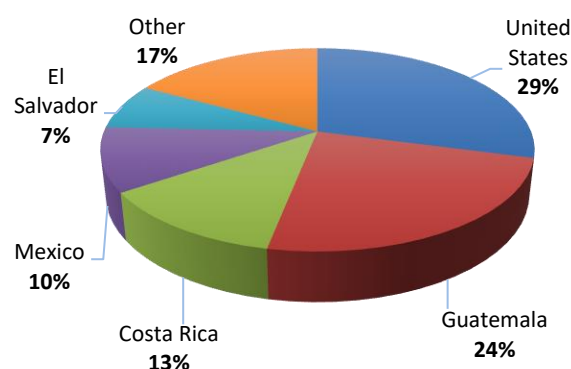


Chart 1: Top Exporting Countries to Honduras

Food Retail Industry

The food industry is projected to grow modestly by 1.2 percent in 2024, despite ongoing challenges such as declining sales. Major retailers, most notably Walmart and Supermercado La Colonia, which together account for 25 percent of the market, are continuing to expand their presence by opening new stores to reinforce their market position.

Food Processing Industry

Honduras' domestic food processing sector is unable to fully meet market demand, creating a reliance on imports. By January 2024, food and beverage imports totaled \$212.4 million, an increase of \$12.9 million compared to the same period in 2023. This growth was largely driven by a \$12.8 million rise in processed food imports, especially wheat, meslin, and rice from the United States.

Food Service Industry

In 2024, Honduras's food service sales totaled \$746 million. The restaurant sector outpaced hotel growth, with the combined industry expanding by 4.2 percent, driven primarily by rising demand for dining and delivery services.

Imports of Consumer-Oriented U.S. Products

\$612 million

List of Top 10 U.S. consumer-oriented products in Honduras

- | | |
|---------------------------------|-----------------------------|
| 1. Pork & pork prod. | 2. Dairy products |
| 3. Beer. | 4. Soups & other food prep. |
| 5. Bakery goods, cereal & pasta | 6. Poultry meat & prod. |
| 7. Condiments & sauces | 8. Nonalcoholic bev. |
| 9. Processed vegetables | 10. Fresh fruit |

Food Industry by Channels (U.S. million)

Retail Food Industry	\$2,094
Food Service-HRI	\$746
Food Processing	\$512
Agricultural & Related Products	\$3,433

Top 10 Host Country Retailers

- | | |
|----------------|----------------|
| 1. Walmart | 2. La Colonia |
| 3. La Antorcha | 4. El Colonial |
| 5. Pricesmart | 6. Los Andes |
| 7. Circle K | 8. Super 7 |
| 9. Star Mart | 10. Pronto |

GDP/Population

Population: 10.66 million

GDP: \$36.97 billion

GDP per capita: \$3.47thousand

Inflation rate: 4.6 percent

Sources: [International Monetary Fund](#)

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
Expedited on-line import process	Small domestic market size and low per capita GDP
Opportunities	Threats
Strong consumer demand for value, high-quality	Political and economic uncertainty. Restrictions on allocation of foreign currency (USD).

SECTION 1: MARKET SUMMARY

In 2024, remittances from Hondurans employed in the United States reached a record high of \$9.7 billion, marking a 5.7 percent increase from the previous year. Remittances now account for more than 25 percent of Honduras' GDP, underscoring their critical role in the country's economy.

Supermarkets and modern grocery retailers are experiencing growth, catering primarily to higher socioeconomic groups. These chains are actively investing in expansion, modernization, and remodeling efforts. Many are also increasing their private label offerings, which appeal to cost-conscious consumers while providing higher margins and reducing supply chain risks for retailers. Private labels are becoming increasingly attractive as impulse buying declines and value-driven purchasing becomes more prevalent.

Despite the growth of modern retail formats, traditional retail channels, such as small local grocers, remain the dominant sales outlets across the region. This is especially true in rural communities, where access to modern supermarkets is limited. Small local grocers, known as pulperías, are deeply embedded in Honduran culture and serve as the primary sales channel for food and beverages. These stores provide convenient access to essential items, particularly in rural areas.

The Consumer-Packaged Goods (CPG) market in Honduras is driven by steady demand for everyday essentials. Recent consumer insights indicate that Hondurans are making fewer shopping trips but increasing their purchase volume by 2.3 percent per visit. Among lower-middle-income populations, there is a noticeable shift toward smaller product formats and greater interest in low-cost brands.

Supermarkets have gained dominance over traditional importers, prompting the latter to invest more in marketing and brand visibility. For new entrants to the market, partnering with a Honduran distributor with strong market penetration is essential.

Advantages	Challenges
Major retailers have expanded the number of stores and floor space in recent years, with plans for continued growth.	The market is highly price-sensitive, and lower-quality products often outperform higher-quality ones due to pricing.
Honduras benefits from a privileged relationship with the United States, including preferential trade agreements under DR-CAFTA and a U.S. military presence.	The economy remains highly vulnerable to global economic shifts, particularly those originating in the United States. Adverse developments can disrupt remittances, tourism, and investment flows.
Food industry technology innovations help business owners better understand and exceed customer expectations.	Political and economic uncertainty continues to pose risks.
U.S. exporters consistently provide diverse food and beverage items year-round.	Lack of Spanish-language labeling and marketing materials can hinder product adoption.

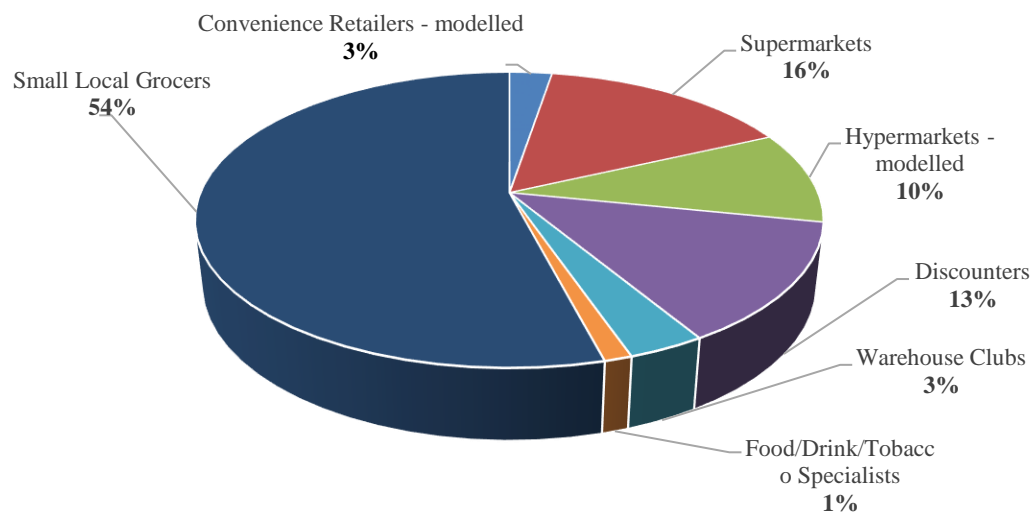
Retail Sales by Channel

In 2024, the retail market in Honduras grew to \$8.58 billion, representing a 1.1 percent increase from the previous year. Euromonitor estimated grocery retail sales, including online retail, at \$5.94 billion. The leading retail channel in Honduras remains small local grocers, which hold a 54 percent market share.

Pricing and promotions are expected to be significant drivers for retail channels during the forecast period, as consumers increasingly wait for seasonal and occasional deals before making purchases. Between 2023 and 2024, channels offering favorable deals have outperformed others in terms of value growth, reflecting consumers' inflation-driven focus on cost efficiency.

Although official data has yet to be released, Honduras has followed the global trend of retail businesses developing private brands. Over the past few years, supermarkets have significantly expanded their private brand offerings, effectively marketing them through dedicated sections and in-store promotions.

Chart 2: Retail Market by Channel 2024 (\$ Million)



Source: U.S. Census Bureau / Trade Data Monitor LLC

SECTION 2: ROAD MAP FOR MARKET ENTRY

Exporters entering the Honduran market should exercise diligence when selecting a local partner, such as an importer, agent, or legal representative. Personal visits or meetings with prospective partners are highly recommended to establish trust and assess compatibility. Exporters should also conduct thorough background checks on potential partners before signing permanent contractual agreements.

Small-to-medium-sized exporters can leverage the resources of U.S. State Regional Trade Groups (SRTGs) for marketing and promotional support in Honduras. Below is a list of SRTGs by geographic region, along with their websites:

National Association of State Departments of Agriculture (NASDA)
www.nasda.org

Western U.S. Agricultural Trade Association (WUSATA)
www.wusata.org

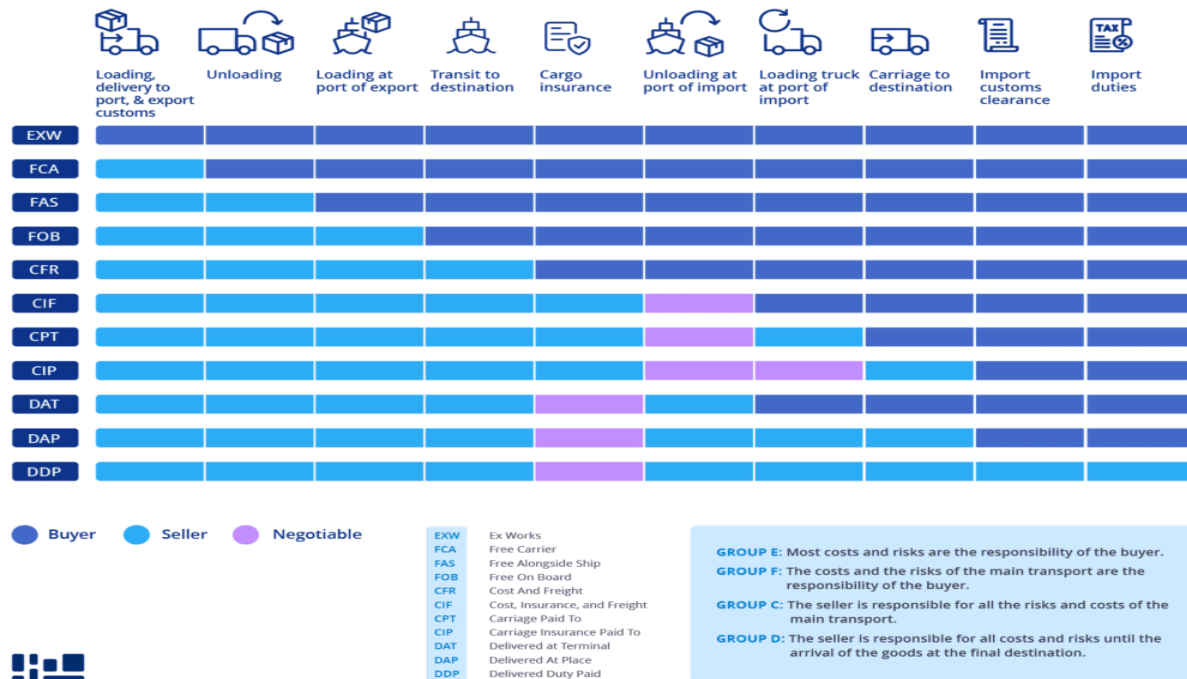
Southern U.S. Trade Association (SUSTA)
www.susta.org

Food Export USA
www.foodexport.org

Collaborating with experienced and professional local importers or distributors is highly valuable for U.S. companies. These partners play a critical role in navigating regulatory requirements, procedures, labeling standards, and customs clearance. Major supermarket chains in Honduras typically manage their own purchasing and importing operations. Therefore, companies seeking to engage with these large retailers must ensure they have the production capacity to meet the substantial volume demands of these chains.

U.S. companies should also specify the appropriate Incoterms in their commercial contracts. Incoterms are internationally recognized standards that define the responsibilities of buyers and sellers for managing cargo, including costs, logistics, transportation, insurance, documentation, and customs clearance. However, Incoterms do not address issues such as property rights, force majeure, or breach of contract, which should be covered separately in the sales agreement. It is important to note that insurance responsibilities vary among Incoterms. Only the "C" terms explicitly assign insurance obligations, which may result in additional insurance costs for buyers. Exporters should carefully evaluate the Incoterms used in their contracts to ensure clarity and avoid unexpected liabilities.

Cost Sharing in Transporting Between Buyers and Sellers



Source: Freightos

Retail Company Profile

1. Walmart

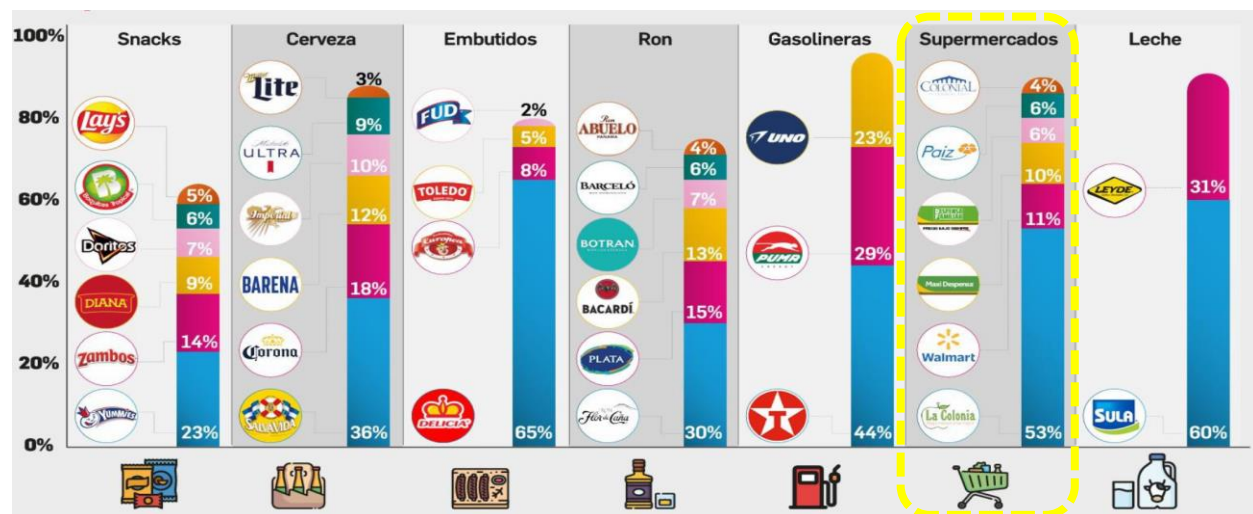
Wal-Mart Centro América S.A. maintains its leadership position in grocery retailing in Honduras, operating 107 retail locations across four store formats:

Discount Stores: Despensa Familiar and Maxi Despensa.	Warehouses: Walmart and Maxi Despensa.
Supermarkets: Walmart and Paiz.	Su percenterers: Walmart.

Walmart is the leading grocery retailer in Honduras. In 2024, its combined retail formats generated \$896 million in sales (excluding taxes), giving the company a 15.2 percent market share, according to Euromonitor. The previous year, Walmart opened a \$1.5 million distribution center in San Pedro Sula, equipped with advanced cold chain technology to improve product connectivity and access. In addition, Walmart has invested heavily in its e-commerce platform, expanding its product range and enhancing the digital shopping experience. These initiatives underscore Walmart's commitment to strengthening its operations and meeting the evolving needs of Honduran consumers.

2. Supermercados La Colonia

Supermercados La Colonia de Honduras S.A. de C.V. is the country's second-largest grocery retailer but ranks first in brand recall, with 53 percent top-of-mind recognition. In 2024, the company achieved a 9.8 percent market share and generated \$576.5 million in retail sales (excluding taxes). La Colonia operates 69 stores nationwide and expanded its retail network by 12 percent in 2024, a strategy that boosted its market share by 10 percent. That same year, it launched a new smaller-format gourmet store targeting the high-end market, aligning with industry trends and evolving consumer preferences.



Source: <https://www.revistaeyn.com>

3. Distribuidora La Antorcha

La Antorcha Supermarket, located in El Progreso's central market, ranks third in the country. It holds a 1.9 percent market share and generates \$111.5 million in retail value.

4. El Colonial

Corporación La Cumbre operates three El Colonial Supermarkets in San Pedro Sula, ranking fourth in the country. The chain reported a retail value of \$84.6 million (excluding sales tax). Colonial Supermarkets offers its own "Colonial Fresh" ready-to-go product line, which includes charcuterie items such as ham and cheese platters, as well as a curated selection of wines.

5. Pricesmart

Pricesmart, a major wholesale club operator in Honduras, ranks fifth with three stores. The company had a grocery sales retail value of \$40.1 million and holds a 1.4 percent market share.

6. Others

The retail landscape in Honduras has seen growth in on-the-go convenience stores, such as Circle-K, Super 7, Star Mart, and Pronto. Additionally, there is an increasing presence of small gourmet stores offering premium cuts and specialty products catering to elite clientele.

Import Procedure

Honduras has specific import procedures for food and beverage products, which are designed to ensure compliance with local regulations, protect public health, and facilitate trade. Below is an overview of the key steps and requirements.

1. Inspection and Documentation Requirements

- SEPA, ARSA, and ADUANAS inspectors assess food and agricultural imports at the port of entry to ensure compliance with SENASA-approved import permit requirements.
- Electronic documentation review includes Import Permit, Phyto/Zoo sanitary Export Certificate, Certificate of Origin, Commercial Invoice, Bill of Lading, and Packing List. Information must be consistent across documents, including details about importer, exporter, shipment content, amounts, product description, country of origin, and point of origin.

2. Product Inspection and Standards

- SEPA inspectors physically inspect products. SENASA mandates that animal-derived products display production and expiration dates on shipping boxes and primary packages in DD/MM/YYYY format.
- Ports of entry enforce these standards rigorously. SEPA requires date stamps even for bulk products like beef chops.

3. Food Safety and Quarantine

- The safety of animal products and byproducts for human consumption is crucial for entry. The exporting country's animal health and pest status are also considered.
- SEPA's Quarantine Treatment Services (SITC) unit treats quarantine pests before product admission. Non-quarantine pests, whether alive or dead, do not receive treatment.

4. Customs Clearance and Sampling

- Customs clearance depends on document submission type (electronic/hard copy), rule compliance, and pest detection. Inconsistent paperwork or pest detection results in product detention or rejection by SENASA.
- Product sampling is random and includes animal products, seeds with import permission, and bacteria or fungi. Samples are analyzed for physical, chemical, and biological properties.

5. Port Operations and Compliance

- Puerto Cortes, Honduras' largest port, has dedicated terminals for cargo handling. OPC handles container loading/unloading, while TEH handles bulk goods.
- All wooden pallets must have the NIMF-15 stamp or require fumigation upon arrival. Non-compliance with NIMF-15 regulations led to 445 seizures in 2020, with 95 percent of 2021 seizures from the United States.

6. Additional Considerations

- **Free Trade Agreements (FTAs):** Honduras is a member of the Central America-Dominican Republic Free Trade Agreement (CAFTA-DR), which may provide preferential tariff treatment for certain U.S. food and beverage products.
- **Restricted and Prohibited Items:** Certain products, such as unpasteurized dairy or items containing *Cannabis sativa* or harmful additives, may be restricted or prohibited.
- **Quality Standards:** Imported food and beverages must meet Honduran quality standards, which align with international norms (CODEX).
- **Documentation:** Ensure all documentation is complete and accurate to avoid delays.

For detailed information on import permit requirements, refer to Honduras GAIN Reports: [Food and Agricultural Import Regulations and Standards](#) and [FAIRS Export Certificate Report](#).

SECTION 3: COMPETITION

The country pursues an open and expanding trade policy, supported by 12 Free Trade Agreements (FTAs) with 36 nations, many of which are multilateral. Key free trade agreements include partnerships with the United Kingdom, the European Union, Panama, Colombia, Chile, Mexico, and South Korea. Additionally, Honduras has bilateral FTAs with Canada and Peru. The country is in the early stages of negotiating an FTA with China, which could further diversify its trade relationships and strengthen its position in global markets.

The free trade agreement between Honduras and other Central American countries, along with the agreement between Honduras and Mexico, creates significant opportunities for these nations

to expand their product offerings in the Honduran market and enhance their competitiveness with U.S. exports. Honduras is also a member of the Central American Economic Integration System (SIECA), alongside Guatemala, El Salvador, Nicaragua, Costa Rica, and Panama.

Product Category	US Market Share 2024 (%)	Market Share (%) by Vol.
Non-alcoholic bev. (ex. juices, coffee, tea)	10.4%	Guatemala 51.2, El Salvador 31.5, USA 9.6
Fresh fruit	4.8%	Guatemala 69.5, Nicaragua 11, Mexico 6.6
Fresh vegetables	16.9%	Guatemala 65.8, USA 18.0, Netherlands 7.9
Beer	51.5%	USA 52.9, Nicaragua 25.6, Mexico 11.9
Bakery goods, cereals, & pasta	15.0%	USA 52.9, Nicaragua 25.6, Mexico 11.9
Processed vegetables	17.8%	Belgium 30.4, USA 17.1, Costa Rica 8.9
Pork & pork products	93.6%	USA 95.4, Canada 4.7, Guatemala 0.7
Dairy products	35.4%	USA 95.4, Canada 4.7, Guatemala 0.7
Dog & cat food	11.2%	Guatemala 52.2, El Salvador 18.4, Mexico 15.9
Condiments & sauces	21.2%	Guatemala 46.2, Costa Rica 19.9, Mexico 4.7

Source: U.S. Census Bureau Trade Data Monitor

SECTION 4: BEST PRODUCT PROSPECTS

Top Consumer-Oriented Products Imported from the World

Soup and other food preparations, bakery goods, cereals, and pasta, dairy products, pork & pork products and non-alcoholic beverages (ex. juices, coffee, tea) categories account for 59 percent of the value of consumer-oriented products imported globally and are among the fastest-growing import categories in Honduras.

Top 10 Consumer-Oriented Imports from the World in 2024 (volume in tons)

Product Category	Un.	2023	2024	Volume (T) 2024/2023	Volume (%Δ 2024/2023)	AVG 5 YR	GROWTH 5 YR
Non-alcoholic bev. (ex. juices, coffee, tea)	T	242,633	251,709	9,076	4%	230,233	12%
Fresh fruit	T	219,210	227,364	8,154	4%	187,881	27%
Fresh vegetables	T	105,654	116,929	11,275	11%	93,101	26%
Beer	T	84,294	111,875	27,581	33%	89,574	17%
Bakery goods, cereals, & pasta	T	92,187	97,501	5,314	6%	87,790	8%
Processed vegetables	T	55,487	59,026	3,539	6%	54,443	7%
Pork & pork products	T	48,582	56,173	7,591	16%	48,054	8%
Dairy products	T	56,760	55,027	(1,733)	-3%	51,927	5%
Dog & cat food	T	42,560	49,617	7,057	17%	43,411	8%
Condiments & sauces	T	42,441	46,402	3,961	9%	41,174	9%

Source: U.S. Census Bureau Trade Data Monitor LLC

Consumer-Oriented Products Imported from the United States

The top five consumer-oriented import categories from the United States by value are: pork and pork products, dairy products, beer, soups and other preparations and bakery goods, cereals, and pasta.

Top 10 Consumer-Oriented Imports from the United States 2024 (volume in tons)

Product Category	Un.	2022	2023	2024	T Δ 2024/2023	% Δ 2024/2023	AVG 5 YR	GROWTH 5 YR
Beer	T	46,962	44,552	57,630	13,078	29.4%	46,842	14%
Pork & pork products	T	43,642	46,350	52,550	6,200	13.4%	45,614	7%
Non-alcoholic bev. (ex. juices, coffee, tea)	T	20,484	23,230	26,154	2,924	12.6%	19,835	19%
Fresh vegetables	T	15,140	19,059	19,731	672	3.5%	15,444	14%
Dairy products	T	22,124	23,977	19,484	(4,493)	-18.7%	18,760	11%
Bakery goods, cereals, & pasta	T	14,737	14,388	14,648	260	1.8%	14,138	3%
Poultry meat & prods. (ex. eggs)	T	11,954	13,815	13,961	146	1.1%	14,502	-4%
Fresh fruit	T	7,800	8,855	10,606	1,751	19.8%	9,927	-1%
Processed vegetables	T	11,923	9,481	10,494	1,013	10.7%	11,076	2%
Soup & other food preparations	T	9,838	10,299	9,997	(302)	-2.9%	9,572	4%

Source: U.S. Census Bureau Trade Data Monitor

Products Present in Market with Good Sales Potential

1. Beer

Beer dominates the alcoholic drinks segment in Honduras, with small local grocers serving as the primary sales channel. There is growing consumer interest in premium and craft beers, particularly among younger adults. Wine consumption is also increasing, though it remains concentrated among affluent consumers. In 2024, Honduras' beer imports grew by 33 percent in volume, with a total import value of \$96 million.

2. Soups and other food preparations

Honduras imported \$474.4 million worth of soups and other food preparations globally in the past year, marking a 17.5 percent increase. The United States accounts for 29.4 percent of the market share by volume, while Guatemala holds 24.2 percent. This category reflects strong demand for convenient and ready-to-eat products.

3. Bakery goods, cereals, and pasta

Honduras imported \$243.5 million worth of bakery goods, cereals, and pasta in 2024, reflecting an 8.2 percent year-on-year increase. Guatemala leads the market with a 40.7 percent share, followed by El Salvador at 19.7 percent, and the United States at 15 percent. Popular imports from Guatemala include fried and toasted tortillas, crackers, sodas, pre-cooked pizza, pancakes, crepes, pastries, churros, and sweet cookies. This category highlights the demand for affordable and versatile food products.

4. Dairy products

The dairy sector in Honduras is dominated by local brands such as Lácteos de Honduras SA (Lactosa) and Nestlé de Honduras SA. However, the market faces challenges such as power outages, which affect refrigeration and limit the purchase of perishable dairy products. In 2024, Honduras imported \$201.9 million worth of dairy goods globally, representing a 2.8 percent decline from the previous year. The United States leads the market with a 35.4 percent share by volume, followed by Guatemala at 21 percent, Costa Rica at 16.5 percent, and Mexico at 8.4 percent.

5. Pork and pork products

Honduras imported \$168.6 million worth of pork and pork products in 2024, with 93.6 percent of imports coming from the United States. This marks a 21 percent increase in value and a 16 percent rise in volume compared to the previous year. Pork remains a staple protein in Honduran diets, and the United States continues to dominate this category.

Products Not Present in Market with Good Sales Potential: All food products are present.

Product Not Present in Market due to Significant Barriers: None

SECTION 5: KEY CONTACTS AND FURTHER INFORMATION

National Plant, Animal Health, and Food Safety Service / Servicio Nacional de Sanidad e Inocuidad Agroalimentaria (SENASA)

Ángel Emilio Aguilar

Title: General Director

Blvd. Miraflores, Avenida La FAO. Tegucigalpa, Honduras

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Sanitary Regulation Agency / Agencia de Regulación Sanitaria (ARSA)

Dorian Salinas

Title: President

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FAS/Tegucigalpa encourages U.S. exporters to review the [Food and Agricultural Import Regulations and Standards \(FAIRS\) Country Report](#) and the [FAIRS Export Certificate Report](#) to better understand the Honduran import regulations, standards, and procedures that apply to their products.

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Attachments:

No Attachments